# UES
## hardware

# Customer Portal
# User Guide

*Your reference to purchasing
online with UES Hardware*

# The power to manage your
# UES Hardware account anywhere, anytime.

# Welcome to the UES Hardware Customer Portal

**UES** hardware

The UES Hardware Customer Portal is your online gateway to the world's finest transport hardware components, supporting your business, anytime, anywhere.

We've designed our customer portal to streamline your purchasing experience, providing you with unparalleled ease and accessibility. Whether you're sourcing components for a commercial heavy haulage fleet or simply want the best for your DIY home project, this platform empowers you to manage your online experience with UES Hardware with confidence.

For more information on UES Hardware, visit www.uesint.com

## Contents

**UES HARDWARE  1300 00 1904 (AUS) OR  (09) 633 4019 (NZ)**

# Navigating the UES Hardware website

The UES Hardware site has been developed to provide our customers intuitive and convenient access to their favourite transport hardware components. With online access anywhere, anytime, you'll have the power to manage your purchases with UES Hardware when it best suits your business and customers.

- By Product category
- By Application
- Search Bar

## Navigating the site by product type

Like the UES Hardware catalogue, products are grouped into families or product categories. To view a specific product category, follow the steps below:

**Step 1.** Hover over the menu item 'Shop by Category'. This will reveal the product categories UES Hardware products are grouped within.
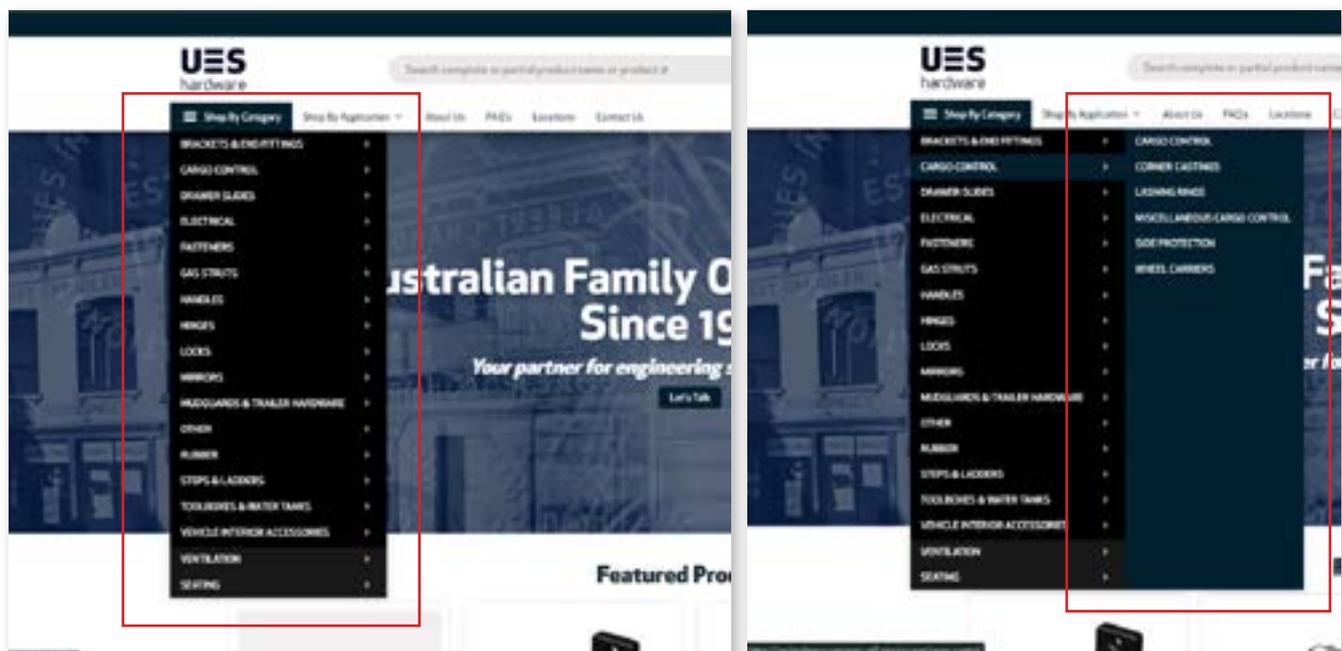
**Step 2.** Find your preferred product category, and either click or hover over your chosen product category. Where a subcategory of products exists, it will be revealed in the menu.

**Step 3.** When a product category or subcategory has been selected, all relevant products for your selected category will be displayed in the search results.

*To access the menu on mobile, select the hamburger menu*

# Navigating the site by application type

The UES Hardware site also has your favourite transport hardware favourites grouped by application type, making it easy to locate products relevant to a specific build or vehicle type; Products available online are categorised into the following applications:

- 4WD canopies and trays
- Bus and Coach
- Enclosure
- Hardware
- Recreational
- Vehicle body building

To view products related to a specific application, follow the steps below:

**Step 1.** Hover or select the menu item 'Shop by Application'. This will reveal the application categories UES Hardware products are grouped within.

**Step 2.** Find your preferred category, and either click or hover over your chosen application category. All relevant products for your selected application will be displayed in the search results.

*Navigating the site by application type can make shopping for familiar products quick and also provides access to new products in each application customers may not yet be familiar with*
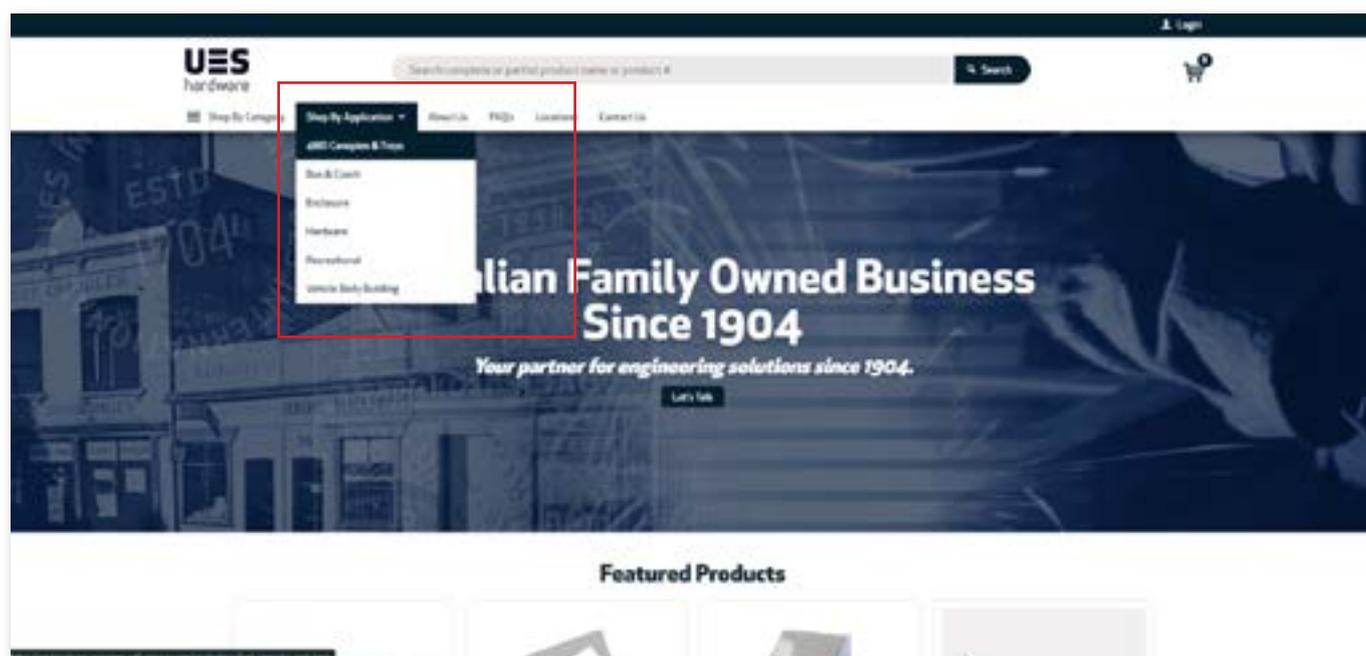


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# Navigating the site by the search bar



The search bar is located at the top of the screen on both desktop and mobile, and is a quick and easy way to search for a specific product, or product category.



*Mobile view*

To search for a product using the search bar, follow the steps below:

**Step 1.** Enter a product code, product name or product category into the search bar.

**Step 2.** Select the Search button.

If entering a product category or partial product name or code, a dropdown with related products will appear under the Search bar. To select an option presented in the dropdown menu, simply click it and the corresponding product page will be displayed.

# Product display views

When viewing a product category or search results, customers can customise how products are displayed on screen and also refine product results using the site's sidebar navigation.

To customise whether products are displayed in grid or list format, select **Grid** or **List** in the sidebar. The products displayed will update automatically to your selection in real time.
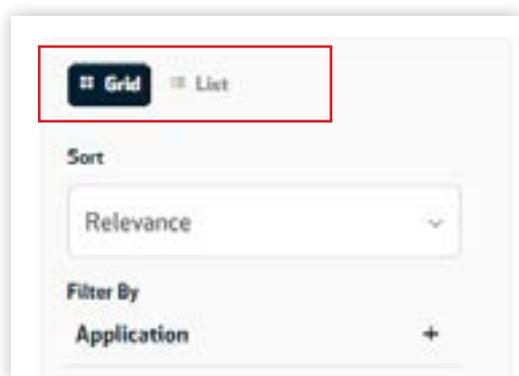


*Customers with a registered casual or trade account can also update product display preferences from the My Preferences screen in the Customer Dashboard*
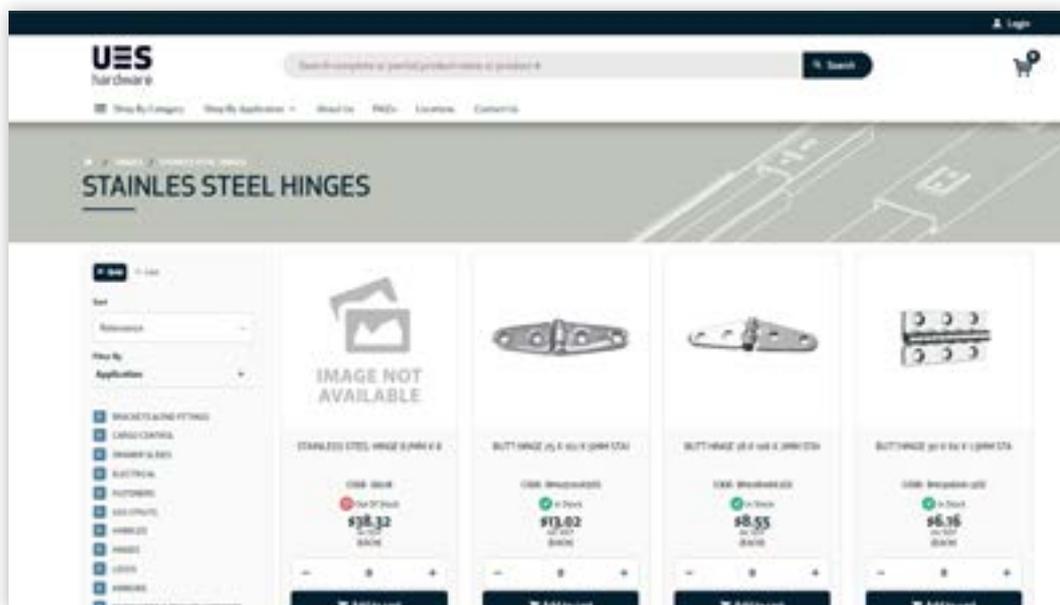
*When **Grid** is selected, products are displayed in the grid format shown.*
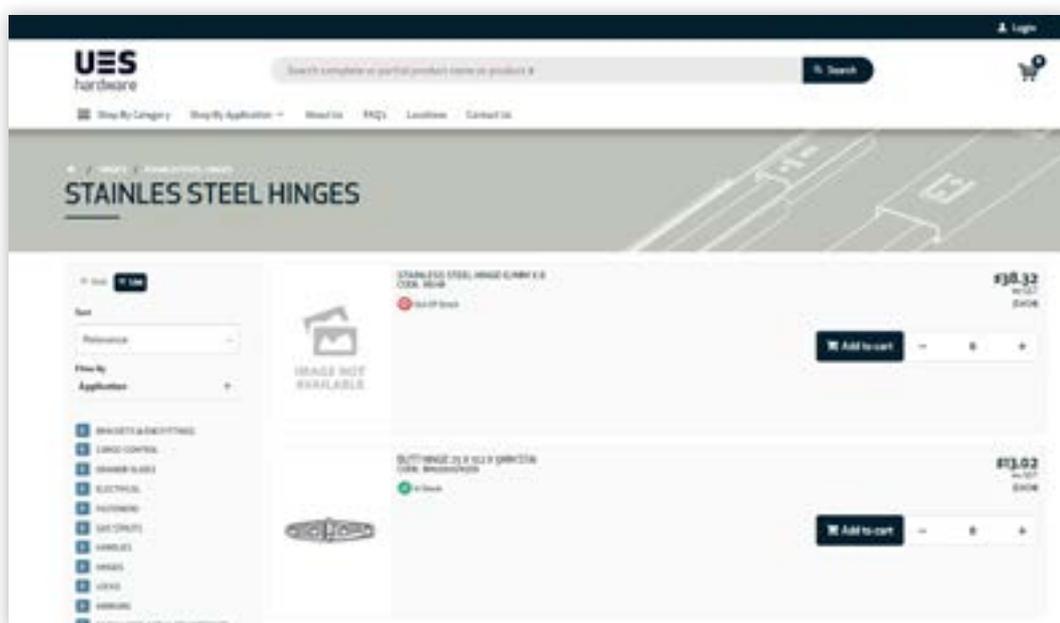


*When **List** is selected, products are displayed in the list format shown.*

## Sidebar filters

Customers can also refine products displayed using the sidebar filters. Search results or products can be sorted products by:

- Relevance
- Product Code Ascending (A-Z)
- Product Code Descending (Z-A)
- Description (A-Z)
- Description (Z-A)

Products can also be further filtered using the Application filter. To use the Application filter, follow the steps below:

**Step 1.** Select the + sign in the sidebar navigation.

**Step 2.** Select the checkbox next to the corresponding application.

**Step 3.** Select the Apply button.

Products displayed will be updated in real time to reflect your selections.
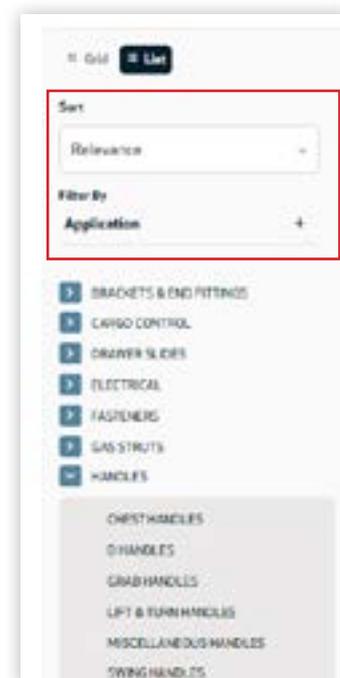
## Sidebar navigation

Using the sidebar navigation, customers can also view different product categories from within a search results page or product category page.

To navigate product categories using the sidebar navigation, follow the steps below:

**Step 1.** From the search results or product category page, select your preferred product category.

**Step 2.** Select the subcategory of your choosing, to display all relevant products on the screen.

*The sidebar navigation makes product selection with the product display view, fast and easy.*

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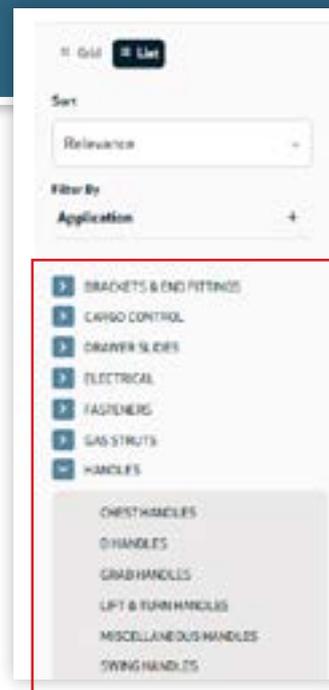
# Why register for an online trade account with UES Hardware?

✓ Order history at your fingertips

✓ Download or reprint invoices when you need them

✓ Manage your trade account balance online, anytime

✓ Create order templates or draft orders to streamline order processing

✓ View or download monthly account statements as required

## The power to manage your UES Hardware account anywhere, anytime.

# Product Pages Overview



Product pages contain essential information related to each product available online with UES Hardware. The product page also has additional information for registered accounts, which are detailed below:

- Product images
- Engineering drawings (where available)
- Product specifications (where available)
- Material and finish details
- Product features and benefits
- CAD drawings (registered casual and trade account customers only)

From a product's page, registered account customers can also 'favourite' a product for quick access later. For more information on 'Favourites', see the section Favourites.
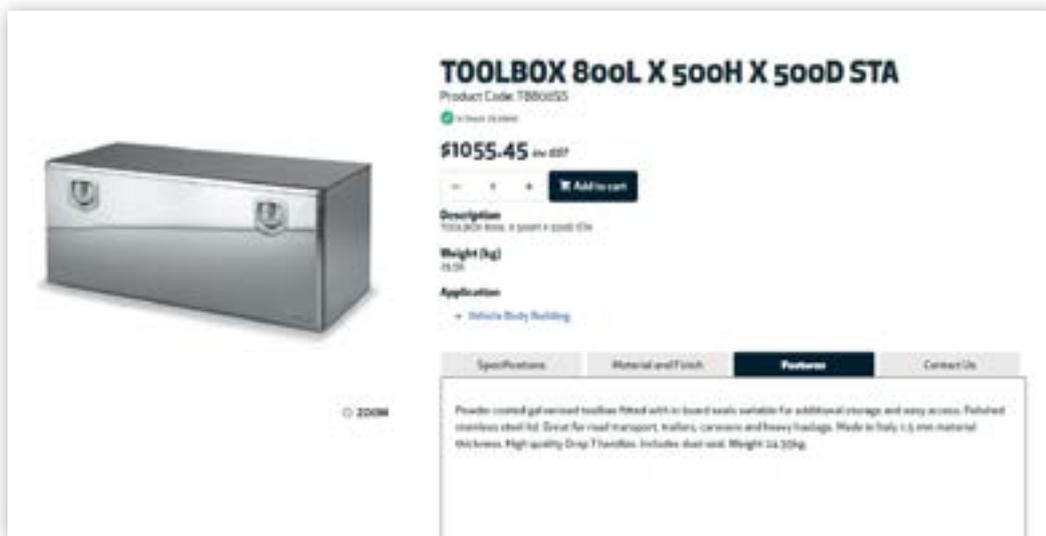


## CAD downloads

Where available, registered account customers can also download a products' CAD file from the product page, for integration into their own project designs and builds. To download a product's CAD file, follow the steps below:



**Step 1.** Navigate to your selected product page.

**Step 2.** Select the CAD file tab within the product page.

**Step 3.** Select Download CAD File.

The file will then download and save into your Downloads folder on your computer or mobile.

# Completing a purchase online with UES Hardware

Purchases on the UES Hardware site are available as a Guest or a Registered account. For further information on completing a purchase as a Guest or with Registered accounts see sections The Checkout Process – Guest Customers and Registered Casual Account Customers, The Checkout Process – Registered Account Customers. NZ customers should also refer to Purchasing as a New Zealand Customer.

Products can be added to your cart via 'quick add' functionality, or directly from a product page. Registered trade account customers can also add products to their cart via:

- Fast Order Entry
- Draft Orders
- Order Templates
- Order Import

Further information on each of these functions can be found within this How to Guide.

## Quick add products from search results

From the search results screen, customers can use the quick add functionality to add a product to their cart.

**Step 1.** From the search results screen, locate your preferred product.

**Step 2.** Adjust your purchase quantity using the + and – buttons for your preferred product.

**Step 3.** Select the 'Add to cart' button.

Your cart will automatically update with your selection.



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# Add to cart from the product page

**Step 1.** Navigate to your preferred product page.

**Step 2.** Adjust your purchase quantity using the + and – buttons for your preferred product.

**Step 3.** Select the 'Add to cart' button.

Your cart will automatically update with your selection and indicates how many products are now in your cart.
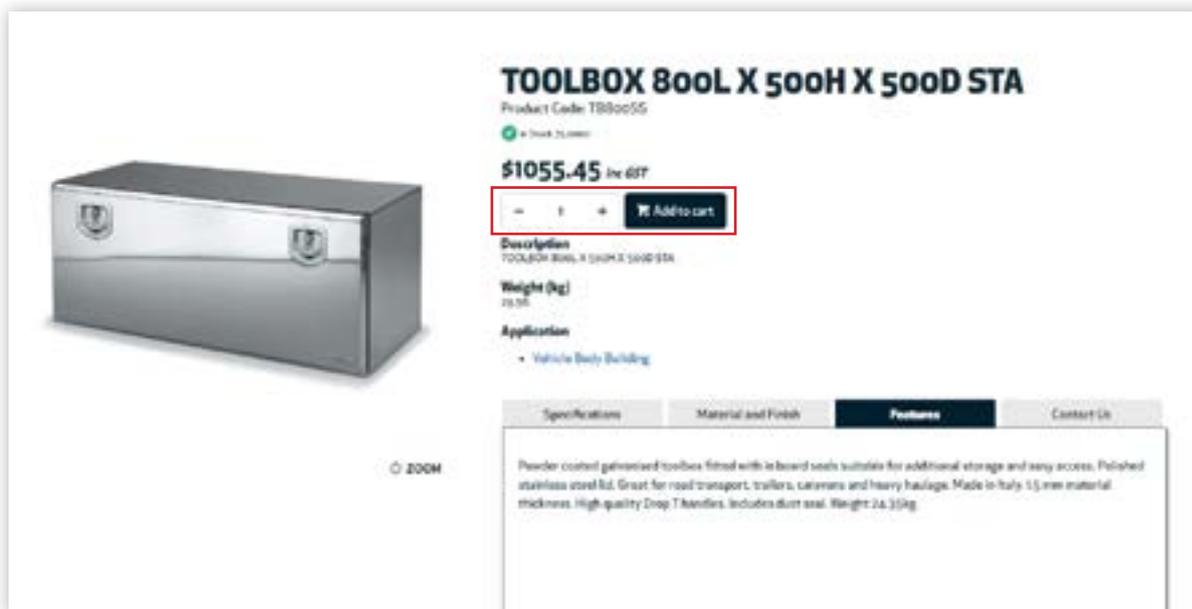


*The cart icon will automatically update with the total number of products in your cart when the Add to cart button is selected.*

# Viewing you cart

For a quick view of your cart, find the cart icon at the top right hand corner of your screen. It will reflect how many items are currently in your cart, represented by a number near the cart icon.

Hovering over the cart icon on desktop will reveal a summary of what products are currently in your cart, as well as the total value of your cart. On mobile, you can view the cart simply by selecting the cart icon.

*Customers can also update product quantities for a specific product or delete a product from their cart, using the quick cart view*
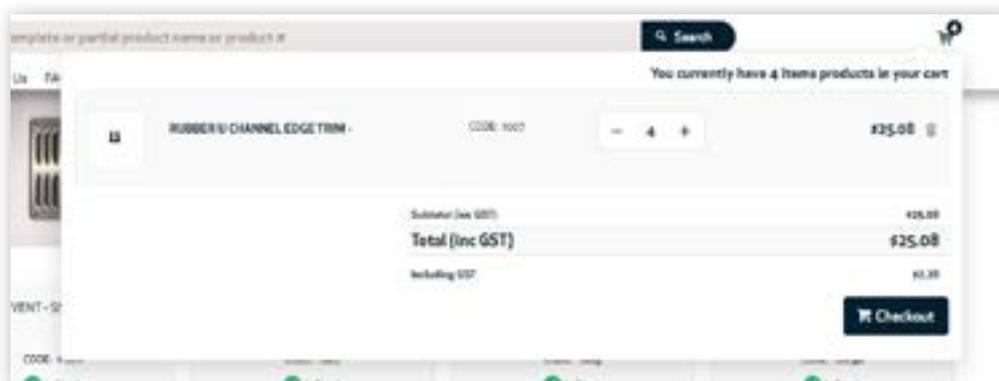
# The cart screen

The cart screen provides a detailed view of the products selected for purchase, quantities, stock availability, as well as the total value of your cart. You can also adjust elements of your order before completing payment from the cart screen as well.

# Adjusting purchase quantities in the cart screen

**Step 1.** Adjust your purchase quantity using the + and – buttons on for your preferred product.

**Step 2.** Select the 'Update' button. Without selecting this button, any notes or quantities changes will not be recorded in your order.
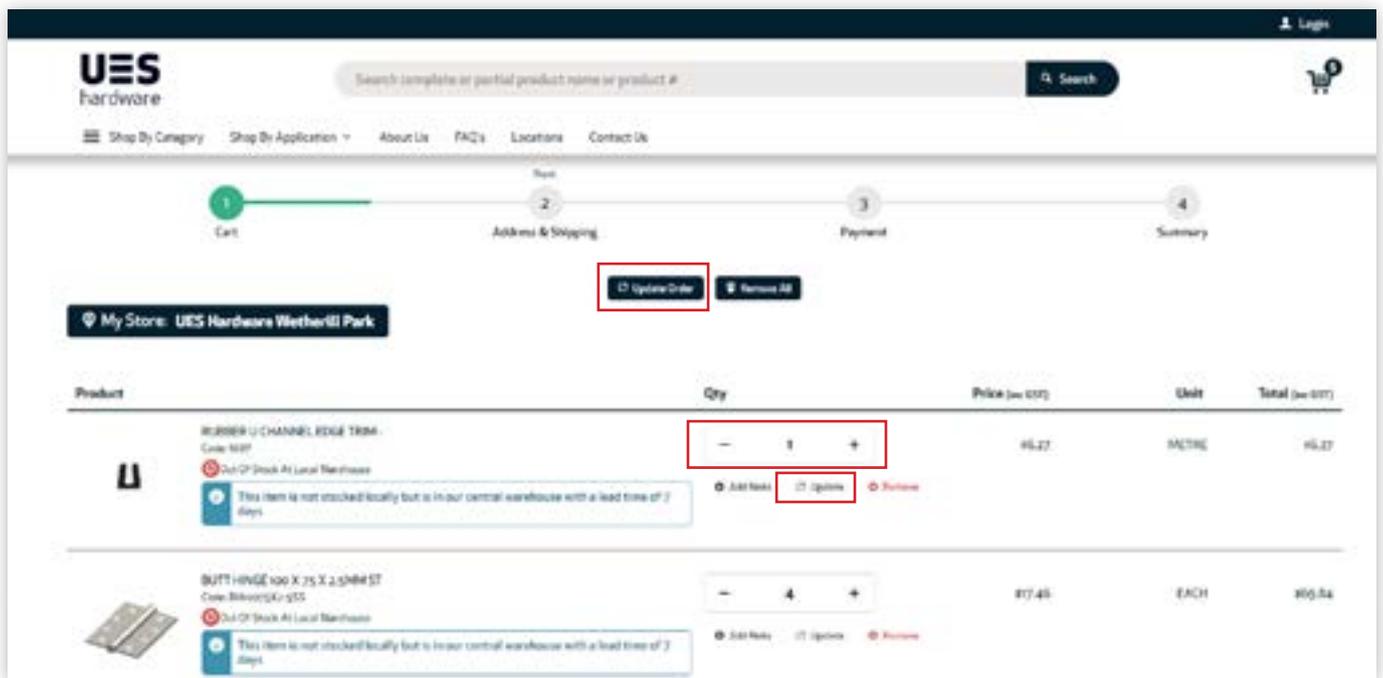


# Out of stock notifications

For registered account customers, when a product that is out of stock is added to your cart, a notification will appear within the cart screen beside the relevant product. Customers can also choose to receive an email notification when the product is back in stock for easy ordering. To request a stock replenishment email notification, simply select 'Notify Me When Back In Stock'. A pop up window will appear that will prompt you to confirm your email address before pressing the 'Submit' button.
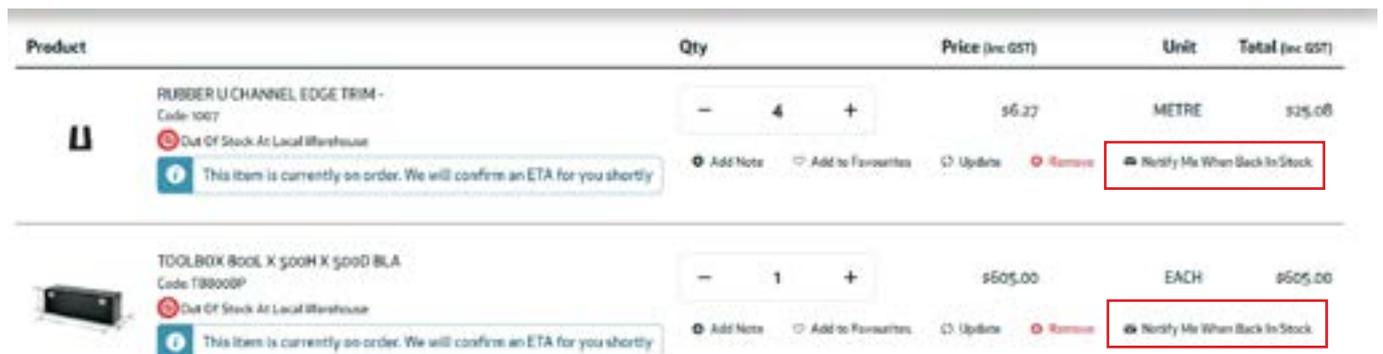
# Adding notes in the cart screen

Notes can be a useful way of adding specific information about a product in your order. To add a note to a product in your cart, follow the steps below:

**Step 1.** Select the 'Add Note' button.

**Step 2.** Enter your note as required.

**Step 3.** Select the 'Update' button. Without selecting this button, any notes or quantities changes will not be recorded in your order.
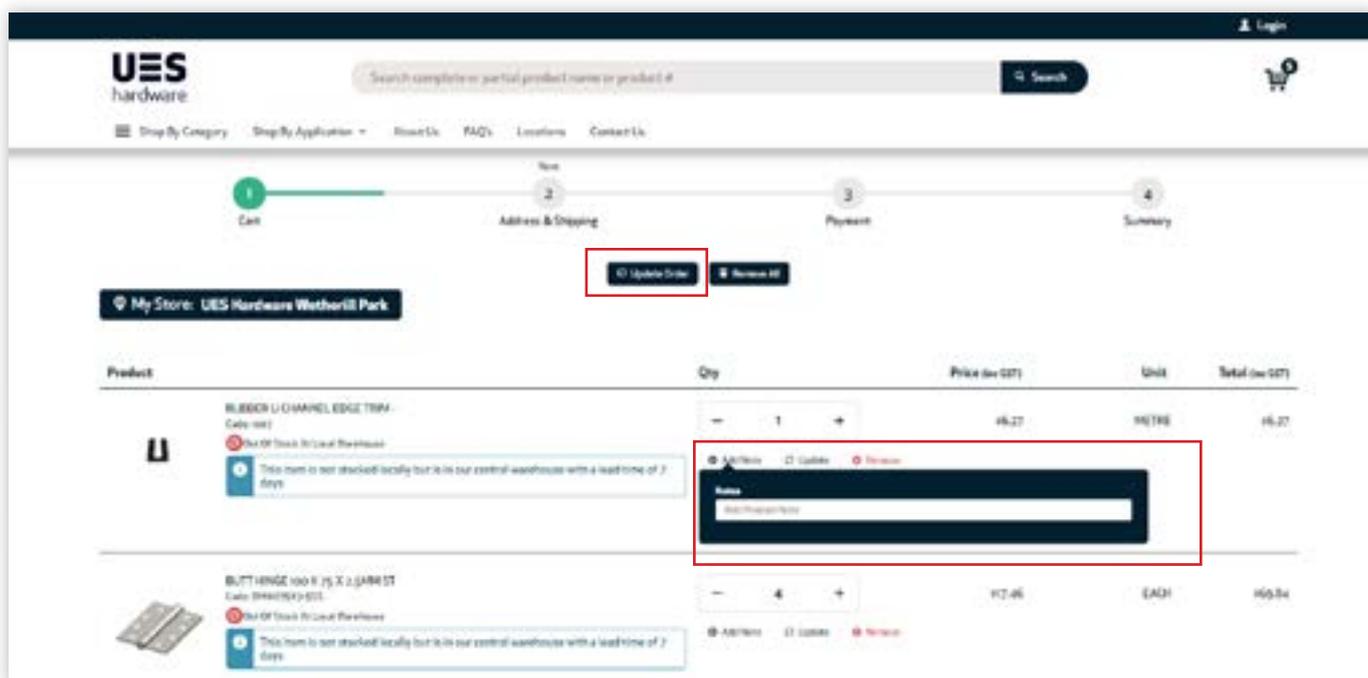


# Fast order entry

Registered account customers have access to Fast Order Entry functionality. Within the cart screen, products can be quickly added by product code or product name, without having to navigate away from the cart screen.

To add products to your order from the cart screen using fast order entry, follow the steps below:

**Step 1.** Enter the product code or product code into the first field, under the Fast Order Entry title.

**Step 2.** Adjust your purchase quantity using the + and – buttons.

**Step 3.** Add any notes if required, before selecting the 'Add to cart' button.

UES HARDWARE  1300 00 1904 (AUS) OR  (09) 633 4019 (NZ)
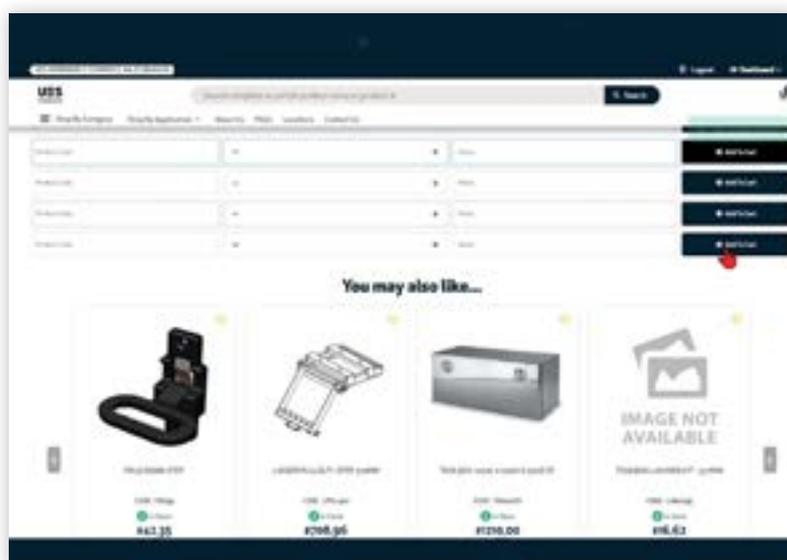
# Freight Estimates

To calculate a freight estimate for your order, follow the steps below:

**Step 1.** In the cart screen, navigate to the bottom of the screen and enter your postcode or suburb into the text box.

**Step 2.** Select your suburb from the dropdown menu.

**Step 3.** Select the 'Freight Estimate' button.

Your predicted freight estimate will appear on screen.
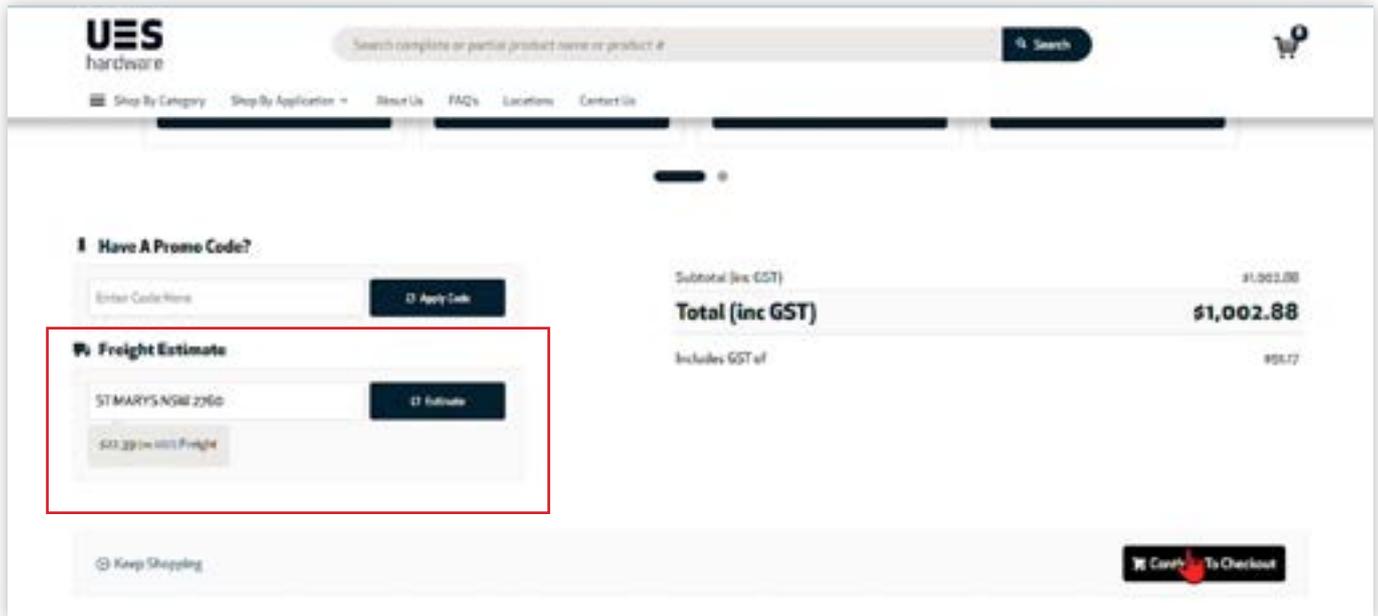


## User roles with the Customer Portal

The UES Hardware customer portal can be accessed by any registered user for your business. When registering a new user for your UES Hardware trade account online, you'll be asked to select from 3 profile options that provide different access to the features and functionality of the customer portal. Select the profile most aligned with the responsibilities of that user in managing your account online when registering.

**User**

**Business user** profiles can:
- Browse products and download CAD files
- Create draft orders and place orders
- Create and manage a favourites list
- Create order templates
- Track existing orders and view order history
- Complete order imports
- Approve orders
- Manage invoice and account payments
- Reprint invoices
- Update customer information and preferences

**Accounts**

**Accounts** profiles can:
- Manage invoice and account payments
- Reprint invoices
- Update customer information and preferences
- Browse products and download CAD files
- Create and manage a favourites list
- Track existing orders and view order history

**Purchasing**

**Purchasing** profiles can:
- Browse products and download CAD files
- Create draft orders and place orders
- Create and manage a favourites list
- Create order templates
- Track existing orders and view order history
- Complete order imports
- Approve orders

# The Checkout Process – Guest customers and Registered casual account customers

The checkout process is relatively quick and ensures all relevant information for the processing of your order is captured prior to completing payment.

Note, registered casual account customers should be logged in before any orders are placed. This is to ensure all orders are recorded within your account and available via the Order History screen within the customer dashboard.

To complete your checkout online with UES Hardware, follow the steps below:

**Step 1.** Select between delivery or customer pickup.

**Step 2.** Within the checkout screen, ensure all mandatory fields are completed. This includes:

- Customer reference
- Contact name
- Phone number
- Address Line 1
- Suburb
- State
- Postcode

**Step 3.** If you selected Delivery, and your delivery address differs from your billing address, select the checkbox below the Contact/Billing address details. If your billing and delivery address are the same, leave this box blank.

**Step 4.** Enter any delivery instructions as required. This may include additional instructions if you are located in an industrial complex, or if there is a locked gate at the front of the facility as examples.

**Step 5.** Enter any order comments as required.

**Step 6 (a).** If the order will be delivered to an address that will be unattended at the time, select the 'Authority to Leave' checkbox.

**Step 6(b).** Select the appropriate authority to leave option from the dropdown menu. If an option is not selected, you will not be able to proceed with the order until completed, or the checkbox is unselected.

**Step 7.** Enter your MasterCard or Visa card details before selecting the 'Process payment' button.

You will receive an email notification confirming your payment and purchase.

# The Checkout Process – Registered account customers

The checkout process is relatively quick and ensures all relevant information for the processing of your order is captured prior to completing payment.

Note, registered trade account customers should be logged in before any orders are placed. This is to ensure that all orders placed online are linked to your trade account, and full functionality of the customer dashboard is active, including Order History, Pay Account and Account Enquiry.

To complete checkout online with UES Hardware as a registered trade account customer, follow the steps below:

**Step 1.** Select between delivery or customer pickup.

**Step 2.** Within the checkout screen, ensure all mandatory fields are completed. This includes:

- Customer reference
- Contact name
- Phone number
- Address Line 1
- Suburb
- State
- Postcode

*Use a unique and easily recognisable Customer Reference when placing an order. This reference can be used to quickly identify the purpose of an order or the customer is for.*

**Step 3.** If you selected Delivery, and your delivery address differs from your billing address, select the checkbox below the Contact/Billing address details. If your billing and delivery address are the same, leave this box blank.

**Step 4.** Enter any delivery instructions as required. This may include additional instructions if you are located in an industrial complex, or if there is a locked gate at the front of the facility as examples.

**Step 5.** Enter any order comments as required.

**Step 6(a).** If the order will be delivered to an address that will be unattended at the time, select the 'Authority to Leave' checkbox.

**Step 6(b).** Select the appropriate authority to leave option from the dropdown menu. If an option is not selected, you will not be able to proceed with the order until completed, or the checkbox is unselected.

**Step 7.** Select the 'Place order on account' button.

Your order will be added to your trade account balance. To find out more information about Pay Account functionality, see section Managing your account online.

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# Purchasing as a New Zealand Customer

New Zealand customers have the ability to add products to their cart but are unable to complete an online purchase at this time. Orders can still be transacted with the UES Hardware NZ branch however, using an online quote generated via the UES Hardware website. To generate a quote online, follow the steps below:

**Step 1.** Collate your order online as detailed in 'Completing a purchase online with UES Hardware' detailed on page 8.

**Step 2.** Within the cart screen, select the 'Download csv' button.

**Step 3.** Select 'Contact Us' from the main menu at the top of the screen.

**Step 4.** Complete the equiry form with your contact information.

**Step 5(a).** Upload your csv download by clicking the 'Select Files' box.

**Step 5(b).** Select your csv from the correct folder on your computer and click the 'Open' button.

**Step 6.** Complete the capcha verification by entering the validation code displayed.

**Step 7.** Select the 'Send' button.

New Zealand customers will receive an email confirmation of their enquiry and will be contacted by the UES Hardware NZ team to complete their order.

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# Registered Accounts

**UES** hardware

Registering for an online user account provides a centralised, one stop shop for valuable information like your order history, updating your contact information or creating a list of favourite products for easy reordering in the future.

There are two types of registered accounts with UES Hardware online, casual user accounts and trade accounts. Businesses with existing trade accounts with UES Hardware should apply for a registered trade account. If you're not a business but a DIY enthusiast or looking for an industrial quality component for a home build or project, select casual user account.

For a detailed view of what is accessible with a registered account, see below:

**CHANGE PASSWORD**
- Update your password regularly for added security

**MY DETAILS**
- Update where you receive email notifications from the system

**MY PREFERENCES**
- Update how products are displayed by default (grid or list)
- Update how many product records are displayed
- Update available Fast Order Entry lines (trade account customers only)

**MY ADDRESS**
- Update your delivery address (casual customers only)

**MY FAVOURITES**
- Mark selected products as favourites
- Create a personalised list of favourite products for quick reference later

**ORDER HISTORY**
- View a list of all previous orders via the site
- Search by order status, order date, delivery date, customer reference, product or order number
- Reprint an invoice

**CUSTOMER DASHBOARD**

**DRAFT ORDERS**
- Create a draft order for review or approval at a later time
- View all created draft orders in one place
- Hold a current order if required

**ORDER TEMPLATES**
- Create a template of regularly ordered products
- Edit existing order templates
- Quick-add products from a template to a new order

**ORDER IMPORT**
- Quickly bulk import multiple orders into a single order
- Uses csv file upload or copy and paste functionality

**APPROVE ORDERS**
- Review all orders submitted for approval
- Control what orders are processed
- Control when orders are processed

**PAY ACCOUNT**
- View outstanding account balances (30/60/90 Days)
- View current account balances
- Pay off your trade account in full or with partial payment
- Reprint an invoice

**ACCOUNT ENQUIRY**
- View monthly account statements online
- Download monthly account statements
- View outstanding invoices
- Download outstanding invoices

Available to Casual Customers

Available to Trade Account Customers

A DIVISION OF
**UES INTERNATIONAL**

# Registering for an online account with UES Hardware

To register for an online account with UES Hardware, follow the steps below:

**Step 1.** Select the 'Login' icon at the top right hand of the screen on desktop, or by selecting the 'Login' icon on mobile.

A pop up will appear with links for online registration for trade account or casual user accounts.

**Step 2.** Select the correct registration link for either casual user account or trade account registration.



*Ensure you select the correct account type when registering online.*

**Step 3.** If registering for a casual account, enter the mandatory information indicated with an asterisk. This includes:

- First Name
- Last Name
- Email Address

**Step 4.** Select a memorable password and enter it in the Password field. Then confirm the password again.

**Step 5.** Enter the capcha verification code as displayed on the screen.

**Step 6.** Select the 'Register' button.

**Trade account registration follows the same steps, but also requests your business name and Customer Account Code.** Inclusion of these additional pieces of information helps UES Hardware to connect any existing trade accounts to your new online trade account.

*Online account registration is both free and fast. Access the world's best transport hardware online, anytime with a UES Hardware registered account*

# Your Customer Dashboard - Casual and Trade accounts

UES hardware

Once you've logged into your UES Hardware trade or casual user account, you'll have access to your customer dashboard. For casual user accounts, you can view your order history, update your contact information, delivery address and create a list of favourite products for easy reordering in the future.

For trade account customers, your dashboard provides enhanced functionality like creating draft orders, approving orders, creating order templates, bulk orders imports, viewing account statements, reprinting invoices or paying your account online. With an online UES Hardware trade account, customers have the access and power to manage their trade accounts when and how it suits their businesses best.

## Accessing your Customer Dashboard

**Step 1.** Log into your customer dashboard by selecting the 'Login' icon.

**Step 2.** Enter the email address you registered your account with.

**Step 3.** Enter your password.

**Step 4.** Select the 'Login' button.

To login on desktop, look for this icon in the top right hand corner of the screen.

To login on mobile, look for this icon in the top right hand corner of the screen.

*Forgotten your password?*

*Reset your password anytime using the Forgot Your Password link in the login screen*

# Updating your password

It is recommended that you change your password regularly and maintain online security procedures within your business to keep your UES Hardware registered account safe. To update your password, follow the steps below:

**Step 1.** Select the 'Change Password' module from your customer dashboard screen or by or by accessing it via the Dashboard dropdown menu in the top right hand of the screen, and selecting Change Password.

**Step 2.** Enter your current password.

**Step 3.** Enter your new password.

**Step 4.** Confirm your new password, before selecting the 'Change Password' button.

It is also important to note that your new password cannot be a previous password used to log into the customer portal. Password rules also apply:

- Must contain one uppercase letter
- Must contain one lowercase letter
- Must contain one number
- Must contain at least 8 characters

A notification will appear on the screen if you new password was accepted by the system or if your new password did not meet acceptable password rules.

**Please keep your new password in a safe place.** UES Hardware does not accept responsibility for unauthorised account access or commercial activities actioned within the customer portal from your account.

# Updating your details

In the 'My Details' module, customers can update the email address where system generated notification emails are sent.

Note, to update your login ID, or the registration email for your online UES Hardware account, please contact our Customer Support team on support@ues-hardware.com.
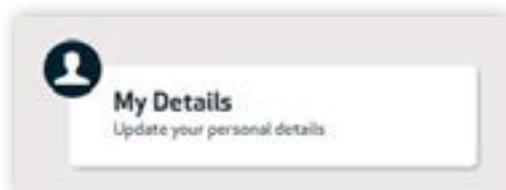
**Step 1.** Select the 'My Preference' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen, and selecting 'My Details'.

**Step 2.** Enter the new email address under 'Notification Email Address'.

**Step 3.** Select the 'Apply' button.

# Updating your preferences

The 'My Preferences' module controls how products are displayed within the site, how many records are shown as a default, and for Trade Account Customers, how many Fast Order Entry Lines are displayed. Customise how the UES Hardware site appears for you, according to your preferences from this module, to enact a global change throughout the site for your profile.
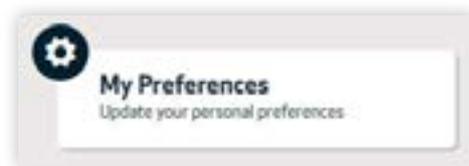


**Step 1.** Select the 'My Preferences' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen, and selecting 'My Preferences'.

**Step 2.** Select the drop down menu for Fast Order Entry (trade account customers only), Default Records per Page, or Default Grid/List Dsplay drop down menus and click on your chosen value for each.

**Step 3.** Select the 'Apply' button.

*Easily customise how products are displayed, how many results appear in search results, and for trade account customers, how many products you can enter in Fast Order Entry.*



# Updating your address



Registered casual users can update their delivery or billing address from the 'My Address' module. Trade account customers can update their delivery address at the cart screen.

Note, registered trade account users must contact support@ues-hardware.com to update their billing address, but have access to amend their delivery address per order.

As a casual user, to update your address:

**Step 1.** Select the 'My Address' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen, and selecting 'My Address'.

**Step 2.** To update your contact or billing address, enter your new details as required.

**Step 3.** If your delivery address is different from your contact or billing address, select the checkbox and enter your new details as required.

**Step 4.** Select the 'Apply' button.

Registered trade account users must contact support@ues-hardware.com to update their **billing address**, but have access to amend their delivery address per order.
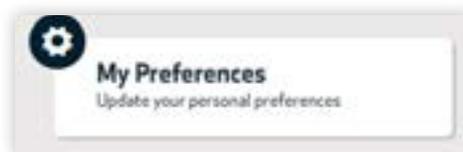
# Creating and updating your My Favourites list

UES Hardware trade and casual user accounts both have access to create a Favourites list. Selecting favourite products gives you quick and easy access to regularly purchased products or products you might be interested in for a future project. To create or upate your favourites list, follow the steps below:
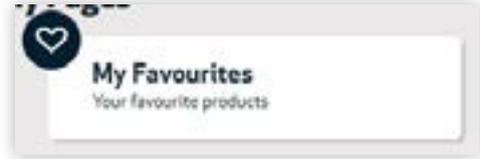
**Step 1.** Navigate to your select product category, or product within the UES Hardware site



BALL TENSION CATCH 23N FORCE S

CODE: BCSS-23N

In Stock

**$73.84**
inc GST
(EACH)

*Favourited products are saved in your 'My Favourites' screen.*

**Step 2.** Favourite a product to by selecting the yellow heart outline located near the product, or on the product page. Once selected, the icon will change to identify it has been added to your favourites list.

**Step 3.** To view your list of favourite products, navigate back to your customer dashboard by clicking the Dashboard link in top right hand corner of your screen on desktop, or by clicking the hamburger menu on mobile and selecting 'Favourites'.

**Step 4.** To remove a product as a favourite, select the heart icon again, which will return to an outline. When navigating back to your favourites list, the product will no longer be visible.

*Favourited products are indicated by a filled yellow icon.*
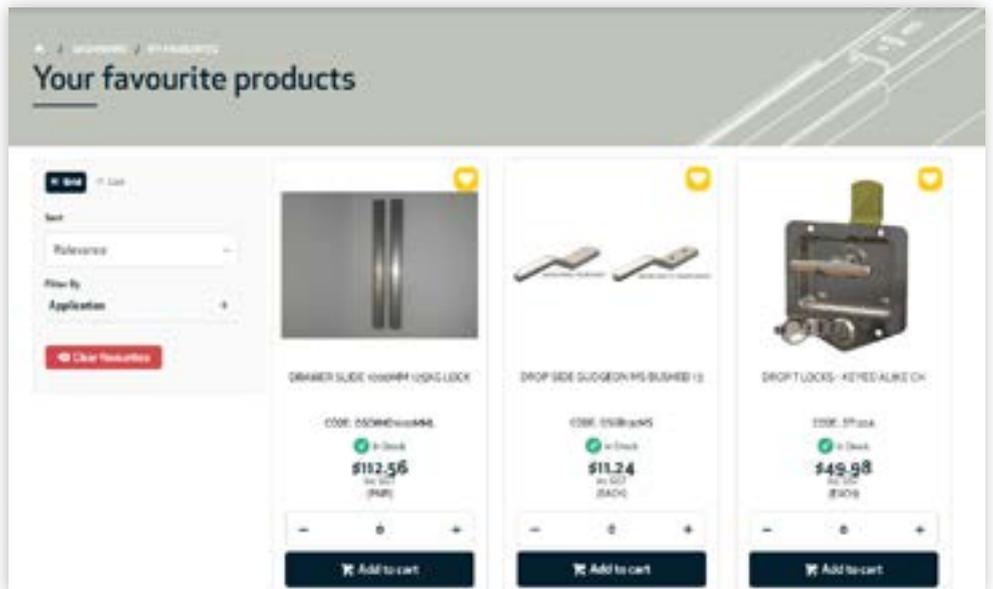


## Notes

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# Accessing your order history

Viewing your order history can be a quick way to track your orders, identify the delivery address entered, or who submitted a specific order online.

Note, 'Order History' is only available to registered casual user or trade account customers. To access your orders online, follow the steps below:

**Step 1.** Select the Order History module from your customer dashboard screen, or by accessing it via the Dashboard dropdown menu in the top right hand of the screen.

**Step 2.** From the 'Order History' screen, you can filter by order status, order date or even delivery date. You can also search by your personalised customer reference entered when the order was processed or by the invoice or order number itself.

**Step 3.** Select the 'Search' button.

A list of suitable matches for your search parameters will then be displayed on the screen.



*Search for a specific order by using the filters or searching for a specific customer reference, product number or order number.*

# View a specific order

If you'd like to view a specific order:

**Step 1.** Locate your selected order by using the filters available in the 'Order History' screen, or by scrolling down the screen and finding the invoice from all previous orders online.

The 'Order History' screen has easy to use filters to help you locate a range or orders within a timeframe (by order date or delivery date), by its current status, or with a specific reference or product number.

**Step 2.** Select the 'View' button next to the order. Details of the order will be displayed on the screen. Here you can view who entered the order, the date it was entered, whether the order was pick up or delivery, the delivery address entered and the specific line items ordered.

Trade account customers can also easily add products from a previous order to a current order from this view, by selecting 'Copy to Current Order'. When using this function, all products from the previous order will be copied to your current order.

*Trade account customers can quickly add products from a previous order to a current order from the Order History screen using using the Copy to Current Order button*

# Reprint an invoice from a previous order

To reprint an invoice from a previous order:

**Step 1.** Search for your selected order using the steps above

**Step 2.** Select the 'Reprint Invoice' checkbox next to your corresponding order.

**Step 3.** Select the 'Request Selected Invoice(s)' button at the bottom of the screen.

**Step 4.** Enter the email address where you would like to receive the invoice.

**Step 5.** You will receive an email containing a pdf of your invoice. Reprint your selected invoice from the attachments contained in the email.
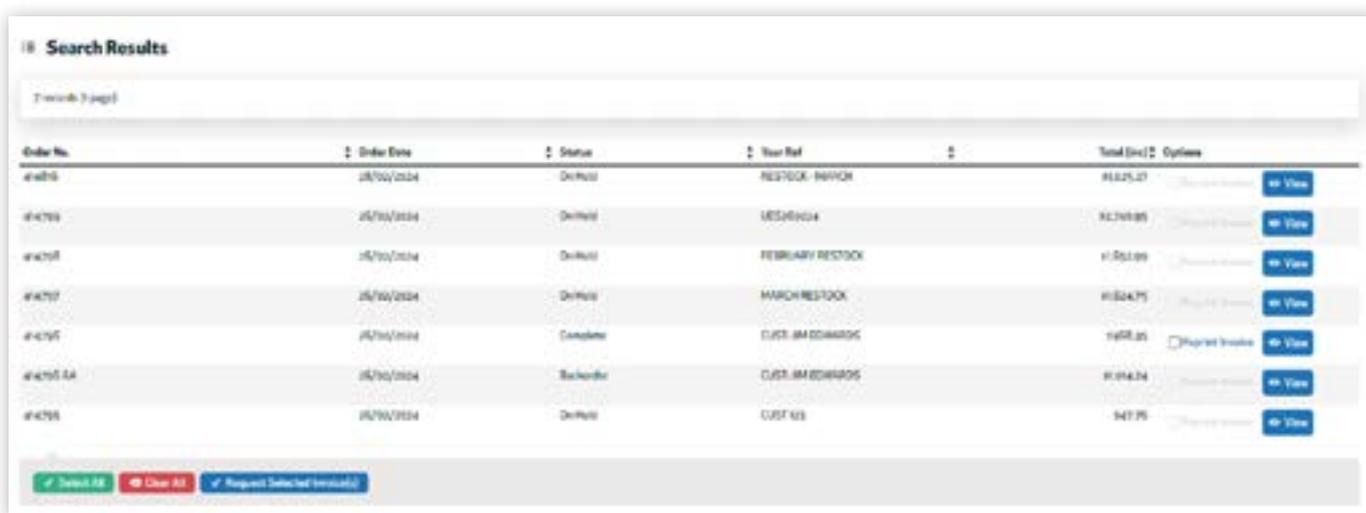
# Creating a draft order

Draft orders allow the items from your cart to be held and an order completed at a later time. This can help streamline orders and minimise freight costs, as multiple draft orders can also be compiled into one single order.

Note, draft order functionality is only available to registered trade account customers.

To create a draft or held order, follow the steps below:

**Step 1.** Add your selected products to your cart, adjusting the product quantity as required.

**Step 2.** From the cart screen, select the 'Hold Order' button.

**Step 3.** Add a memorable hold reference to help you differentiate between held orders at a later time, before selecting the 'Confirm' button.

# Reactivating a held or draft order



From the 'Draft Order' screen, you can view all the draft orders available in your trade account. You can also view specific draft orders, delete draft orders or copy a draft order to your current cart.
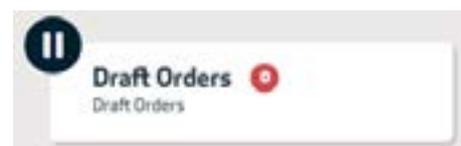
Note, draft order functionality is only available to registered trade account customers.

To reactive or review your list of draft orders, follow the steps below:

**Step 1.** Select the 'Draft Order' module from your customer dashboard screen or by hovering over the Dashboard link in the top right hand corner of the screen, and selecting 'Draft Order'.

**Step 2.** Find the draft order you would like to resume and select the 'Resume Order' button next to it. You will be redirected back to the cart screen with the items contained in the draft order to complete your purchase.

**Step 3.** Review your order and complete your purchase by selecting the 'Proceed to checkout' button to make payment.



# Order templates



Order templates can make regular orders quick and easy by simplifying the ordering process with a pre-saved list of products available from your customer dashboard anytime.

# Create a new order template

To create an order template to simplify future orders, follow the steps below:

**Step 1.** Add your selected products to your cart, adjusting the product quantity as required.

**Step 2.** From the cart screen, select the 'Save As Template' button.

**Step 3.** From the order template screen, ensure the 'Create new template' radio button is selected.

**Step 4.** Enter a relevant order template name.

**Step 5.** Select the 'Save Template' button.

# Adding products to an existing order template

To create an order template to simplify future orders, follow the steps below:

**Step 1.** Add your selected products to your cart, adjusting the product quantity as required.

**Step 2.** From the cart screen, select the 'Save As Template' button.

**Step 3.** From the order template screen, ensure the 'Append to existing template' radio button is selected. If you wish to overwrite an existing template, select the 'Overwrite existing template' button instead.

**Step 4.** Select the correct order template from the template name dropdown menu.

**Step 5.** Select the 'Save Template' button.

# Using an order template

From the 'Order Template' screen, you can view each of the order templates saved in your trade account online. Quickly create an order from an order template with a few simple clicks, using the steps below:

**Step 1.** Select the 'Order Template' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen.

**Step 2.** To view a specific order template, select the 'View' button beside it.



**Step 3.** Once in the order template, you'll have the option to adjust the quantity of each product in the template, or to delete the product if it's no longer required.

**Step 4.** Generate an order from your selected order template by selecting the 'Add All to Cart' button.

Your cart will automatically update once products from the order template have been added to your cart, allowing you to complete your purchase online from the cart screen.
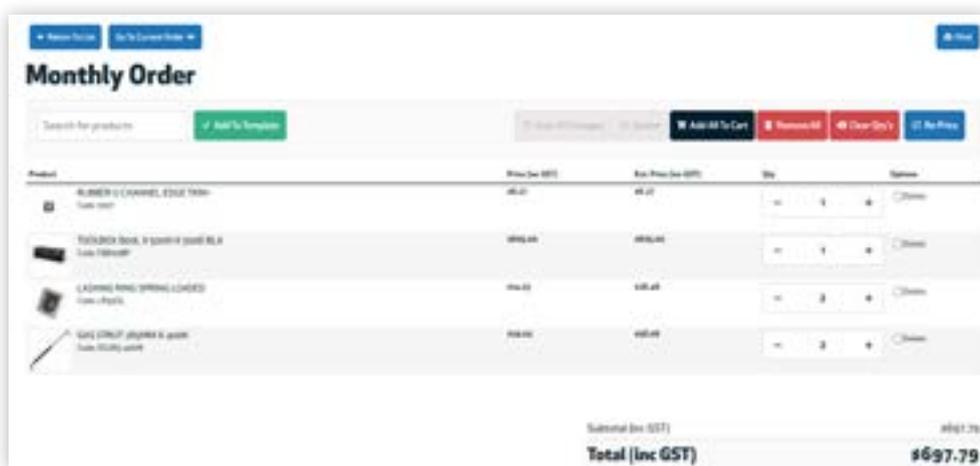


*Customers can also quick search and add products from within the order template itself, by entering a product code or search term in the search box. Select the correct product from the drop down and the 'Add to template' button. The order template will automatically update to reflect the new product.*

**UES HARDWARE  1300 00 1904 (AUS) OR  (09) 633 4019 (NZ)**

# Repricing products in your order template

Should a product saved in your order template be subject to a price change, the customer portal will prompt you to refresh or re-price those products with an on-screen notification.

To re-price products saved in your order template select the 'Re-price' button in the order template screen.
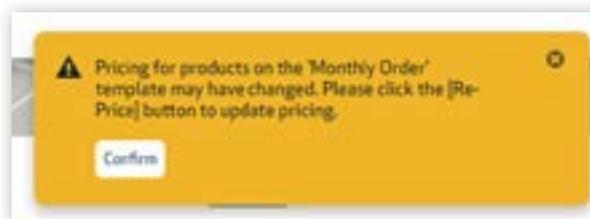




*When you receive a notification onscreen that new pricing may be available, select the Re-Price button to refresh all available updates.*

# Order Imports

Order imports allow trade account customers to quickly and conveniently import orders directly into the site from a single screen. Orders can be imported via the a csv file upload, or with copy and paste functionality from a csv data file. This can be particularly useful for larger businesses or when orders are received from multiple locations and managed through a central procurement team.
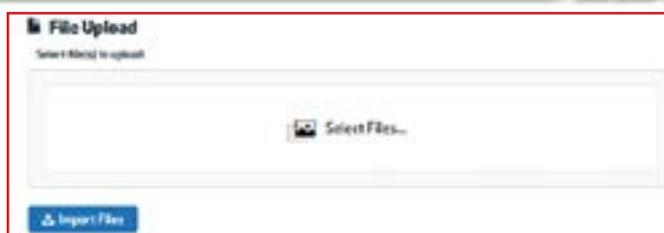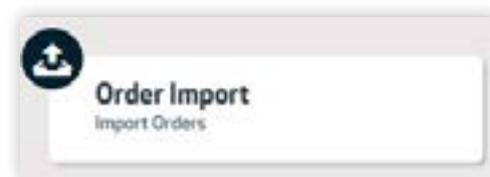




*'File Upload' allows customers to upload .csv files into the Import order screen. Once successfully imported, the cart will automatically update with the specified products included in the file.*

*'Data Import' allows customers to copy and paste data from a csv file into the data import window. Once successfully imported, the cart will automatically update with the specified products included in the copy and paste.*

# Import orders via csv file upload

**Step 1.** Select the 'Order Imports' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen.

**Step 2.** To import one or multiple orders online, simply click anywhere in the 'Select Files' box.

**Step 3.** Select the correct csv file from your computer and click open. If successful, you'll notice a notification on screen confirming the file was accepted.
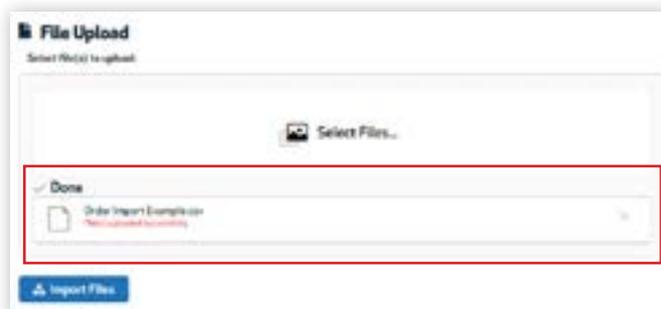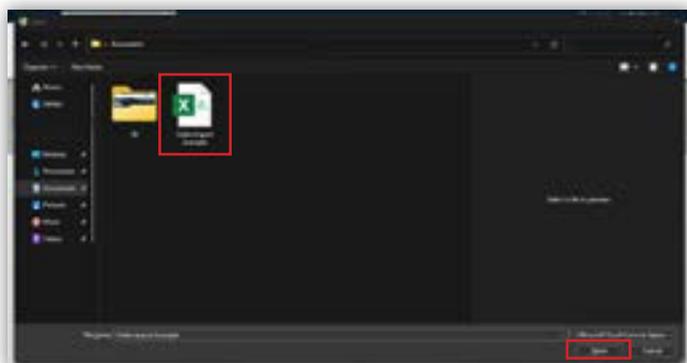


**Step 4.** Select the 'Import Files' button. If the file upload is successful you'll notice an on screen notification that confirms the upload was accepted into the system.

**Step 5.** Your cart will automatically update with the products and quantities included on the csv file. Complete your purchase as normal.
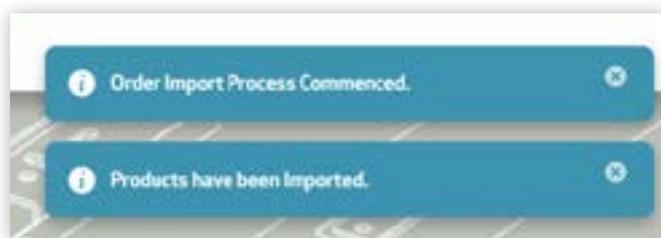


*On screen notifications appear in the top right hand corner of your screen, near the cart icon.*

# Import orders via copy and paste

**Step 1.** Select the 'Order Imports' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen.

**Step 2.** Open your source file from your computer that includes your product codes and quantities for your order.

**Step 3.** Ensure the file only includes the product codes and quantities in the format indicated in our example. Copy and paste your data by selecting all of the correct cells from the csv file and pressing CTRL C.

**Step 4.** Within the 'Order Import' screen, click inside the data import window. Press CTRL V to paste your data directly into the import window.

**Step 5.** Select the 'Import Data' button. If the data is uploaded successfully you'll notice an on screen notification that confirms the upload was accepted into the system.

**Step 6.** Your cart will automatically update with the products and quantities included on the csv file. Complete your purchase as normal.

| Product code | Quantity |
|---|---|
| Product code | Quantity |
| Product code | Quantity |
| Product code | Quantity |
| Product code | Quantity |
| TB600BP | 4 |
| CS405-300N | 20 |
| 273021-06H-S | 5 |
| BH04040X5PB-RF | 10 |
| BH0407/6X2SS | 10 |

*When copying and pasting data, the format should include product code and the required quantity on the same line. Complete this for as many products as is required. An example of how this should appear is below.*

# Managing your account online

UES Hardware trade account customers can also conveniently pay part or all of their account balance online anytime. This functionality allows you to manage your payments 24/7, giving you the freedom to view your current account balance, make a partial or complete payment or reprint invoices at any time.

From the 'Pay Account' screen, you can view a list of all previous invoices or search for a specific invoice if required. From this screen you can also view the financial status of your trade account, including any current invoices payable, and outstanding invoice amounts at 30, 60 and 90 days.

## Access your account balance online

From the 'Pay Account' screen, customers can view any outstanding invoices or account balances at any time. A summary of outstanding accounts is available from the 'Pay Account' screen, and can also be filtered by time frame.
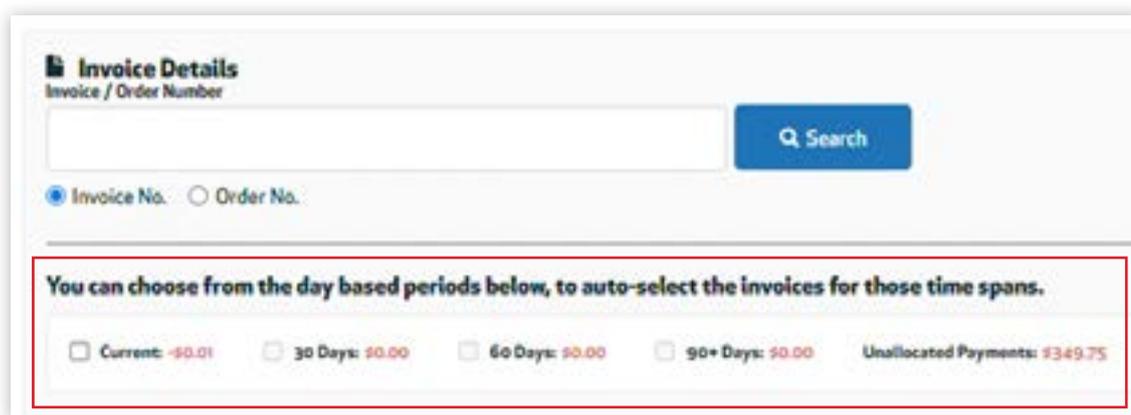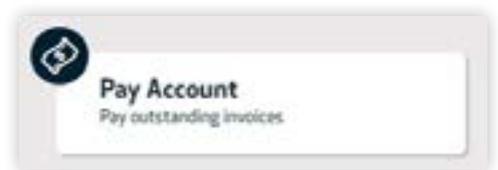


*Any outstanding amounts will be displayed in the summary screen by timeframe (indicated by red text.)*

To view your account balance by a specific timeframe, simply select the the checkbox next to the corresponding timeframe. The results displayed on screen will automatically update in real time to reflect your choices.

## Search for a specific invoice or order
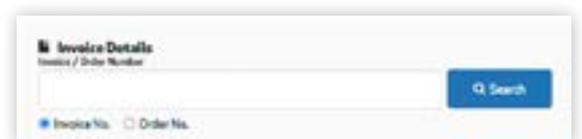
**Step 1.** Select the 'Pay Account' module from your customer dashboard screen or by accessing it via the Dashboard dropdown menu in the top right hand of the screen.

**Step 2.** Enter the invoice or order number in the text field box.

**Step 3.** Indicate if the number entered is an invoice number or order number using the radio buttons on the screen.

**Step 4.** Select the 'Search' button.

If a matching record is found, it will be displayed on the screen. If a partial invoice or order number was entered, a list of invoices or orders will be displayed with the corresponding reference that was searched.

# Reprint an invoice (Pay Account Screen)

UES hardware

**Step 1.** To reprint an invoice, search for your selected invoice in the 'Pay Account' screen using the steps outlined in Search for a specific invoice order instructions above.

**Step 2.** Select the 'Reprint Invoice' checkbox next to your corresponding order.

**Step 3.** Select the 'Reprint Selected' button.

**Step 4.** Enter the email address where you would like to receive the invoice in the pop up screen that appears.

**Step 5.** Select the 'Submit Reprint Request' button.

**Step 6.** You will receive an email containing a pdf of your invoice. Reprint your selected invoice from the attachments contained in the email.

Note, invoices can also be accessed in the 'Order History' screen within your customer dashboard.

or

*Customers can reprint multiple invoices at once by selecting the checkbox next to each corresponding order to be reprinted.*





*To receive a copy of an invoice to multiple email addresses, include a comma between each email address added.*

# Pay your account balance online (Trade Accounts only)

UES hardware

Paying your account balance for your UES Hardware trade account is a simple and quick process. It is designed to help you maintain your account health conveniently when it works best for you.



To make a payment on your account balance, follow the steps below:

**Step 1.** From the 'Pay Account' screen, select the invoice(s) you would like to make a payment for. The payment total at the bottom of the screen will update automatically to reflect your changes in real time.

**Step 2.** To complete full payment on the selected invoices, select the 'Continue' button.

**Step 3 (a).** If completing payment by credit card, enter your current credit card information in the fields provided, before selecting the 'Process Payment' button.

**Step 3 (b).** If completing payment by direct bank deposit, use the bank details presented on the screen to complete your payment. Include your bank reference number in the text field on screen and select the 'Pay Account' button.

Once your payment has been completed, you'll receive confirmation message on the screen.

*Customers can select to pay one or multiple invoices with a single transaction, or even make partial payments to one or multiple invoices at the same time.*

# Completing a partial account payment

Customers have the option of paying for one or multiple invoices in full, or making a partial payment. To complete a partial payment within the 'Pay Account' screen, follow the steps below:

**Step 1.** Select the invoice(s) that you would like to complete a partial payment towards via the checkbox next to each relevant invoice.

**Step 2.** In the 'Payment Amount' text box, enter the amount you would like to pay. The total at the bottom of the screen will automatically update in real time to reflect your changes.

**Step 3.** Select the 'Continue' button.

**Step 4(a).** If completing payment by credit card, enter your current credit card information in the fields provided, before selecting the 'Process Payment' button.

**Step 4(b).** If completing payment by direct bank deposit, use the bank details presented on the screen to complete your payment. Include your bank reference number in the text field on screen and select the 'Pay Account' button.



Once your payment has been completed, you'll receive confirmation message on the screen.

# Accessing account statements



UES Hardware trade account customers can access and view their trade account statements online anytime using the 'Account Enquiry' module. From the 'Account Enquiry' screen, you can view your account status for your selected month, your account balance, last payment date, as well as any outstanding amounts for the month. You can also conveniently view your statements online, or download them at any time.

To access your account statements, follow the steps below:



**Step 1.** Select the 'Account Enquiry' module from your customer dashboard screen or by hovering over the Dashboard link in the top right hand corner of the screen, and selecting Account Statement.

**Step 2.** Select the relevent statement month to view or download.

**Step 3.** Select the 'Display' button to view your selected statement on your screen.

You can also download your selected statement as a csv file for reference later. Note, your statement is not available or download as a pdf at this time.

**Step 4.** To download an account statement, select the 'Download' button.

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